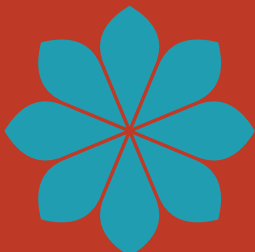


Sustaining the Environment and Visitor Economy in Cornwall

Chris Gaskell, Natalie Craig,
Jane Wills and Rowan Hartgroves

REPORT



JUNE 2021

Acknowledgements

This project was part-funded by the UKRI Strategic Priorities Fund. We are very grateful to Dr Nigel Sainsbury for early research support and facilitating the stakeholder workshop. Thanks to everyone who participated in the workshop, interviews or survey involved in this project. We are grateful to Visit Cornwall and the Cornwall Wildlife Trust for permission to use the images in this report.



**Cornwall
Wildlife Trust**



**UK Research
and Innovation**



**CORNWALL &
ISLES OF SCILLY**
LOCAL ENTERPRISE PARTNERSHIP



Growing Your Business.
Growing Our Environment.

Citation

Gaskell, C., Craig, N., Wills, J., Hartgroves, R. (2021). Sustaining the Environment and Visitor Economy in Cornwall. Environment and Sustainability Institute, University of Exeter, UK.

Contact

Professor Jane Wills: j.wills2@exeter.ac.uk



Photos

Thank you to Matthew Jessop, Malcolm Brown, Terry Whittaker, Adam Gibbard, Chris Gomersall, Ian Kingsnorth and Ben Watkins for supplying imagery.

Contents

| | |
|--|-----------|
| Executive summary and introduction | 4 |
| The environment and visitor economy in Cornwall | 6 |
| Research aims and objectives | 7 |
| Research findings | 10 |
| Nature-based activities | 10 |
| Funding mechanisms | 13 |
| Organisational infrastructures | 15 |
| Recommendations and next steps | 19 |
| Local networks | 19 |
| Nature recovery projects | 19 |
| Visitor gifting | 19 |
| Nature education for hospitality staff | 20 |
| Rural visitor economy development | 20 |
| Technology-assisted visitor economy | 20 |
| References | 21 |
| Appendices | 22 |
| Appendix A: Workshop participants and interviewees | 22 |
| Appendix B: Surveys | 22 |
| <i>Resident/Visitor Survey</i> | 22 |
| <i>Business Surveys</i> | 25 |
| Appendix C: The global tourism industry and sustainability | 25 |

List of Tables

| TABLE | TITLE | PAGE |
|-------|---------------------------|------|
| 1 | Research methods by phase | 8 |

List of Boxes

| BOX | TITLE | PAGE |
|-----|--|------|
| 1 | The WiSe Scheme | 11 |
| 2 | Eden Project | 11 |
| 3 | Hotel Visitor Gifting | 14 |
| 4 | National Trust | 14 |
| 5 | Tin Coast | 15 |
| 6 | CoaST - Cornwall Sustainable Tourism Project | 16 |
| 7 | Watergate Bay Environmental Tourism Trust (WETT) | 17 |

Executive Summary and Introduction

The tourism industry, particularly in rural and coastal areas, is often heavily reliant on thriving ecosystems. Healthy ecosystems bring a range of benefits, not least the provision of food, water, and natural beauty for the visitor and local community alike. However, tourists can threaten the quality of the local environment, and the 'burden' of over-tourism is a growing concern in many parts of the world (Wood et al., 2019).

The COVID-19 pandemic has heightened concern about the potential for over-tourism in Cornwall, as increasing numbers of people have taken their holidays 'at home' in the UK rather than abroad. At the time of writing, summer 2021 looks set to place further pressure on Cornwall's local environment.

However, the impacts of the pandemic also present an opportunity to explore ways of rebuilding the economy and society, to put nature's recovery centre-stage.

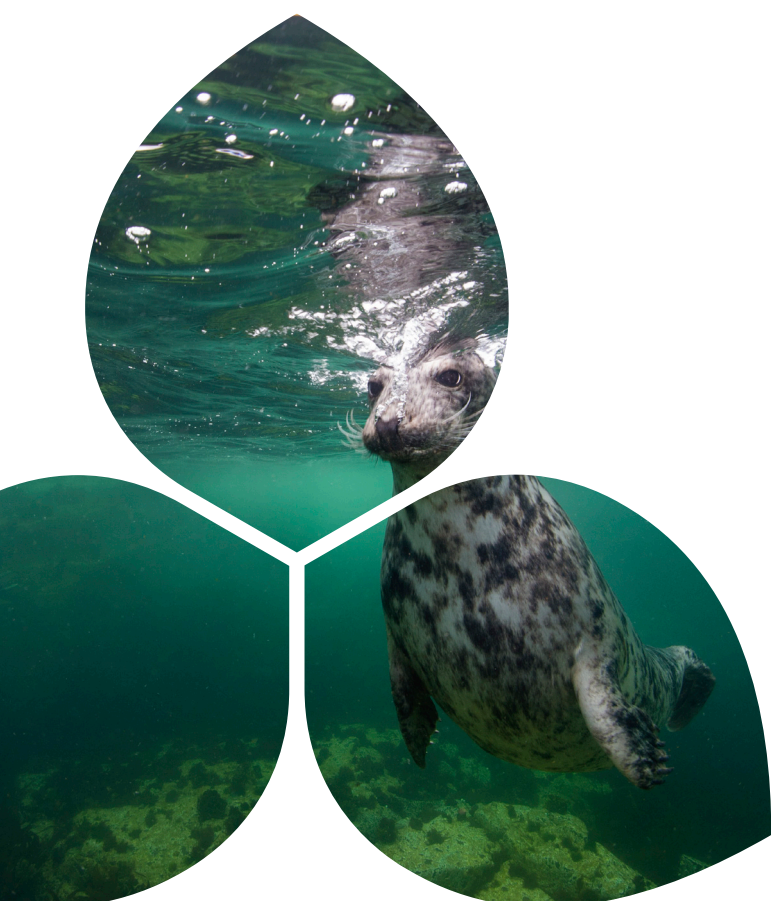
Funding from Research England's Strategic Priorities Fund, administered through the University of Exeter, allowed partners and researchers to conduct a short project (running between January and March 2021) to explore potential policy ideas that could be further developed in the future. Our task was to identify, evaluate, and test the acceptance of locally-relevant evidence-based ideas to:

- (1) Reduce any negative impact of tourism on nature in Cornwall; and
- (2) Generate understanding, funds, and volunteer time to protect and restore nature in Cornwall.

This report is one of a pair, the other focusing on the Isles of Scilly, available [here](#).

Following a review of potential policy innovations, the partners and additional stakeholders agreed to focus on the development of nature-based activities, funding mechanisms, and appropriate organisational infrastructures to support nature and a sustainable visitor economy. This report outlines findings from investigations into these ideas, including recordings from a workshop, interviews with key stakeholders, and surveys conducted with nature-based activity providers, residents and visitors.

Participation in nature-based activities is widely seen as a core attraction of Cornwall's visitor economy. Ideas for their development initially focused on certification and standards as methods to ensure appropriate visitor engagement with nature, and to generate revenue for nature-focused organisations that would provide the expertise to train activity businesses, in return for qualified promotion.



Given the diversity of activity provision and practical difficulty of standards enforcement, the support for such measures was not universal. However, opportunities were identified for training hospitality staff to effectively become front-line marketers for nature-based activities, and in developing nature recovery projects as a new type of attraction to which visitor contributions could produce tangible, shared benefits.

Funding mechanisms to support the protection and restoration of nature aroused strong opinions in relation to the recurring topic of a tourism tax. Industry participants made clear their opposition to such a measure. Survey respondents, both residents and visitors, indicated a preference for visitors to contribute in comparison to locals, although the exact mechanism was generally unspecified. Best practice local examples of visitor gifting schemes point towards a solution to suit all parties, and this approach could be developed on a wider scale.

Examples of networks at the local, regional, and sectoral scales were discussed, generating a variety of viewpoints about the best model for developing and delivering locally-led nature-based activities and visitor giving. Institutional support was advocated to encourage collaborative local endeavours, with the potential to benefit nature, communities, businesses, and visitors.

Development of the rural visitor economy and the emergence of technological infrastructure were also raised as potential routes to mitigate the impact of over-tourism and seasonality effects. These approaches have the potential to be further developed.



The Environment and Visitor Economy in Cornwall

Tourism began in Cornwall with the introduction of the railways and the concept of leisure time permeating deeper into British society. The creation of the railway links in the 1860s reduced the journey time between London and Penzance from two days to 12 hours, opening the county to increasing numbers of visitors. By the early 20th century, rising living standards and falling transport costs facilitated the growth of tourism. Since then, the tourism sector has grown into a significant industry in Cornwall, with the aid of both targeted public sector funds and private sector investment.

At the time of writing, Cornwall is one of the UK's top holiday destinations and sees an estimated 5 million visitors every year. A sharp growth in the sector has led to increased tensions with local communities and rising pressure on infrastructure, from roads, to footpaths, to hospital beds. The industry finds itself at a crossroads, as it looks to recover from the pandemic whilst fully acknowledging both the positive and negative impacts of the changing tourism landscape on Cornwall. The sector body, Visit Cornwall, aims to promote the visitor economy and profile the destination internationally while also ensuring its long-term survival. Visit Cornwall wants to ensure that tourism is encouraged as part of a low-carbon sustainable approach that balances *"purpose and profit in equal measure, protecting people and place"* (Bell et al., 2020: 11).

This approach is timely, due to the significant decline in Cornwall's natural heritage in recent years. Nearly half of terrestrial mammals are now found in fewer places in Cornwall than in the 1980s, and half of breeding birds have declined; furthermore, reports of seal disturbances have doubled over the past 9 years (Cornwall Wildlife Trust, 2020). Such changes are caused by a number of factors, many of them not directly associated with tourism, but the pressure of visitor numbers is acute in some places. The fact that many visitors travel to Cornwall in order to appreciate the natural environment provides an opportunity to engage them in preserving and enhancing it, both during and after their visit.

Extensive work is underway to support the environment and aid nature recovery in Cornwall. Since the council declared a climate emergency in 2019, councillors and officers have developed a programme with the aim of reaching net zero carbon emissions by 2030 (Cornwall Council, 2019). In tandem, the council has a 50-year Environmental Growth Strategy, which aims to reverse ecological breakdown and bring back nature to Cornwall's land and sea (Cornwall Council, 2021). This framework is still in development, with the objective not only to conserve nature, but to restore it. The Nature Recovery Plan will map the most valuable areas for wildlife, identify opportunities to enhance nature, and develop local priorities for increasing biodiversity. Thus, the Plan will collect evidence to identify where projects and funding would be best placed. The plan will be co-owned and co-created by the Cornwall and Isles of Scilly Local Nature Partnership, and coordinated by Cornwall Council.



Research Aims and Objectives

With an estimated 5 million visitors coming to Cornwall each year, our project sought to explore how visitors can not only protect the nature around them, but also contribute to its restoration. The aim of the project was to lay the foundations for Cornwall to be an exemplar in ways of combining tourism with environmental restoration. In this regard, as stated earlier, our objectives were to identify, evaluate, and test acceptance of locally relevant evidence-based ideas to:

- (1) Reduce any negative impact of tourism on nature in Cornwall; and
- (2) Generate understanding, funds, and volunteer time to protect and restore nature in Cornwall.

The project had three phases:

- (1) Scoping best practice from the literature and consulting the project partners about their understanding of what is happening in Cornwall;
- (2) Holding a participatory workshop to produce a shortlist of top innovations that can be further developed;
- (3) Developing new policy ideas and innovations, to be further explored through interviews with stakeholders and related surveys (see Table 1).

The methods used varied to ensure there was sufficient data to develop concrete ideas for future action. The research followed University of Exeter ethical guidelines and all interviewees and workshop participants were fully informed about the project prior to participation. Once the data were finalised, they were stored securely in full compliance with the requirements of GDPR. The recordings were transcribed using Otter.ai and then re-edited, if required, for use in this report.

COVID-19 restrictions meant that all research was conducted remotely, and interviews and workshops were organised on Microsoft Teams. This research was carried out during the third UK national lockdown and the funding requirements meant that it had to be completed in just three months (January to March 2021). Due to the short timeframe for research and COVID-19 restrictions, there was not an opportunity to carry out ethnographic research in local tourism hotspots, nor did we have the time or resources to test the recommendations in practice. Our aim has been to identify ideas that can be further explored and developed by the project partners in the future.

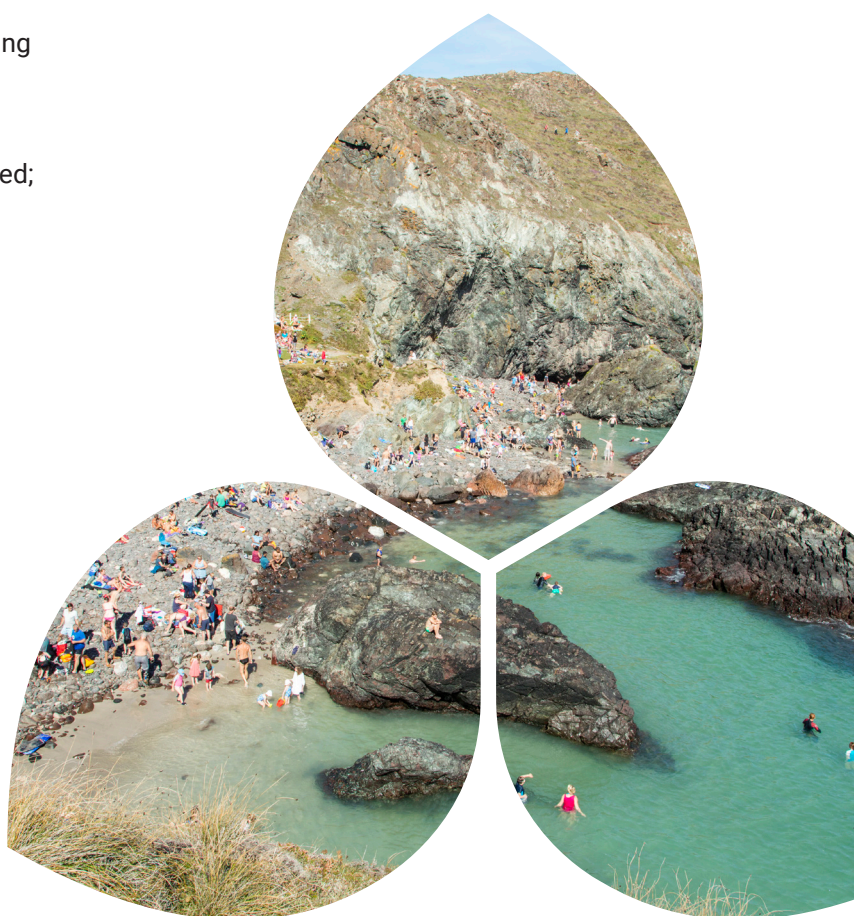


Table 1: Research methods by phase

| Phase 1 |
|--|
| Sector research: Academic literature review of key issues in tourism, online research into global best practice, and conversations with leading academics in this field at the University of Exeter. |
| Weekly meetings with project partners: A regular opportunity to discuss emerging ideas, research development and data with the core group, consisting of representatives from Cornwall Council, Cornwall Wildlife Trust, CIOs LEP, and the University of Exeter (Penryn campus). |
| Research meetings to explore local activity: In order to develop potential innovations, it was vital to understand what was already happening in Cornwall. The research team carried out meetings with CoaST and Visit Cornwall to hear about tourism management and sustainability strategies and activities, and their successes and failures. Discussions with Cornwall Council, the AONB, and Cornwall Wildlife Trust covered Local Authority priority strategies and current land management practices. Finally, there was a meeting with Conscious Creatives to explore the role of communication and engagement strategies. |
| Phase 2 |
| Stakeholder workshop, 18th February 2021: A 2-hour workshop was held online and facilitated by Dr Nigel Sainsbury, involving a group of 18 attendees, including project partners and additional guests who represented accommodation providers, attraction and land managers, social enterprises, conservation organisations and councils. The list of attendees is included in Appendix A. The research team presented ideas emerging from phase 1, which were discussed and augmented by the group. A voting system was then used to determine preferences about which ideas to take forward to phase 3. |
| Phase 3 |
| Interviews: A semi-structured interview format was designed to explore ideas, with freedom to gather broader insight pertaining to interviewee interest and expertise. Participants from the workshop were invited, in addition to other contacts made during the research process. In total, 12 interviews (10 video calls and 2 phone calls) were conducted over 3 weeks, with recording and transcription using Otter.ai. Relevant segments were drawn from the transcripts and summarised into themes for reporting. |
| Business Surveys: A one-question survey shared via the Tevi* newsletter was designed to reach businesses with an interest or experience in offering nature-based activities, in order for them to provide details about those activities (n=11). A second questionnaire followed up with these organisations asking 15 questions to gather deeper insights (n=7). The text responses provided a useful insight into nature-based activity provider attitudes in relation to some of the ideas generated. |
| Individual Surveys: A 7-question nature-focused survey was developed for anyone who visits or lives in Cornwall, distributed via social media, email newsletters, and contact lists (n=476). This survey sought to elicit attitudes around the perceived state of nature in Cornwall and the UK, the type of nature-based activities undertaken, and ways of supporting nature. A framing treatment was included halfway through the survey, highlighting findings from the State of Nature in Cornwall report. Over 80% of respondents could be categorised as residents and the remainder as visitors, enabling a subgroup analysis to draw out any differences. A final open-response question for further comments on the topic yielded 145 responses. These were categorised for further analysis (further information is available in Appendix B). |

*Tevi is an EU-funded business support programme for Cornwall and the Isles of Scilly with dual aims of economic and environmental growth, based at the University of Exeter (Penryn).

The initial phase of research, encompassing literature reviews, best practice discovery, scoping interviews and partner feedback, identified four broad ideas for presentation at the stakeholder workshop in February:

- **‘Shared vision for nature’** was based on the perceived need for a clear, objective state of nature in Cornwall, which stakeholders, including visitor economy businesses, would be inspired by and could buy into, with definable targets.
- **‘Nature-based experiences’** explored ways in which visitors could both increase their engagement with and funding of nature, via certificated experience or activity providers.
- **‘Nature action days’** focused more on voluntary activities, combined with encouraging local nature champions.
- **‘Virtual ecosystem’** addressed aspects of the digital tourism offer, suggesting a more holistic and novel approach to supporting nature than currently exists.

It is important to note that direct revenue generation strategies, with dedicated revenue streams to support nature, were also examined by the research team. Given the potential for this theme to dominate discussion, we decided against inclusion at the workshop, preferring to explore it in the later phase of research.

Workshop participants included project partners and a wider group invited from key stakeholder organisations. Given project time constraints, it was encouraging to gather 18 attendees, and informal feedback suggested that they valued the opportunity to share new ideas. The research group presented the four ideas, after which participants were invited to contribute their own suggestions. Feedback was then gathered, before a voting system was employed to rank as many of the ideas as appealed. Given that the additional suggestions were not fully developed, this was not a particularly rigorous process, but it did allow for an indication of group preference. After the workshop, all the ideas were assessed and re-categorised into broader themes.

Support was strongest for exploring nature-based activities, through broadening the visitor offer, engaging people with nature, and exploring the potential for revenue generation. Another well-supported theme highlighted the need for improved local networks to encourage and enable collaboration, overseen by institutional infrastructure to provide appropriate frameworks and guidance. The development of digital infrastructure was supported in relation to the potential for visitor management and enhanced visitor offers. A more sustainable transport infrastructure was also raised as a matter to be addressed, given the known issues in coping with high season demand, as well as carbon neutral targets.

Following the workshop, the next phase of research combined interviews and surveys to test and explore these ideas and associated themes. The results are presented in relation to each potential innovation in turn.



Research Findings

Nature-based activities

The idea presented at the workshop envisioned nature-based activities designed to engage visitors with nature, either run and/or certified by nature-based charities, thus providing a means of revenue generation to help protect and restore nature in Cornwall. Certified businesses would benefit from promotion by respected organisations such as Cornwall Wildlife Trust, Visit Cornwall, Cornwall Council or tourism-facing businesses. Although well-received as a theme, several suggestions and challenges were raised at the workshop, which were then further explored in the interviews and surveys.

Questions of Supply

There are already numerous providers in Cornwall, offering a broad range of activities and formats. These include accommodation providers offering staff-run activities or advice for self-guided activities, independent experts/guides, and larger activity businesses. Whilst not opposed to new provision, some respondents were concerned that any policy proposal should make sure to consider the experience of these existing activity providers. Our business survey garnered a handful of responses from quite a narrow range of low-intensity activities, so further research would be required to understand the full scale of activity provision.

Questions of Demand

Doubt was expressed by some accommodation providers about the extent of visitor demand. In their experience, it was difficult to entice more than a handful of participants to take part in activities such as beach cleans or pre-booked paid-for activities, so expanding such offers was perceived as potentially misguided. One accommodation provider was more positive in respect of activity take-up, because it was more central to their current offer and they were able to work with a captive audience who stayed on site for the duration of their stay; the uniqueness of their situation limited the opportunity for external activity providers or other businesses to learn from this case.



Survey results indicated that 24% of visitors take part in paid-for nature-based activities, 28% in free club or group activities, and 83% in self-guided activities, suggesting visitor preference for autonomy and/or cost control. Higher proportions of visitors indicated interest in taking part in activities that would directly contribute to nature (68%) or paid activities to support nature (62%), so there may be value in appropriate marketing strategies for these. The resident population were less likely than visitors to take part in paid activities (13%), but also indicated increased interest in activities that directly contribute to nature (83%), as well as indicating more modest support for paid (38%) activities to support nature.

Standards and Certification

Views were mixed about the desirability and practicality of such measures. Activity providers who establish relationships and gain recommendations through expertise and quality service have no need of standards, and it may even diminish their offer if arbitrarily imposed, implying equivalence with standard-achieving but lower quality offers. One participant likened this to a qualification from catering college, questioning whether that really denotes an ability to cook, compared to an experienced chef. An opposing view was that a standard, if respected, would be considered a necessity for continuing or new provider relationships. The issue of respect for standards was also highlighted as being potentially problematic, however, both in terms of monitoring resources, and reputational risk, if infringed by poor quality provision. A current training scheme provider highlighted the need for consistency of approach when dealing with particularly vulnerable types of nature, whereby the poor behaviour of providers can have cumulative negative impacts if unchecked (see Box 1).

1. The WiSe Scheme

The WiSe (standing for Wildlife-Safe) Scheme is the UK's national training scheme for minimising disturbance to marine wildlife. In operation since 2003, WiSe started in Cornwall, when founder Colin Speedie noticed rapid growth in marine tourism, without adequate safeguards against wildlife disturbance. With an ethos of enabling tourism to coexist alongside the needs of the natural world, the organisation runs training courses primarily with providers who take visitors on marine wildlife watching tours, and has recently expanded its offering to adventure activities such as kayaking, paddleboarding and coasteering. The courses are run by local experts, ensuring contextual best practice and trusted partner recognition. Newly trained operators can use the WiSe logo for up to three years, after which refresher training is required to maintain accreditation. Upgraded training to Master level is also available. Despite being a voluntary scheme, most regional wildlife operators are now accredited, including all of those on the Isles of Scilly. Monitoring of operators does not take place due to impracticality, so adherence to standards is trust-based, encouraged by the signing of a code of conduct at the end of a course. WiSe has operated on a break-even basis, although reliant on significant voluntary time. Charitable status is on the radar as WiSe prepares for a new generation of leadership.

Staff Training

One of the accommodation providers expressed a strong interest in the provision of nature-engagement training for staff - *"we would enrol almost our entire team onto some sort of accredited training, if we could. I think there will be huge enthusiasm for that."* This would lead to greater understanding and respect for nature, and hopefully inspire a new generation of nature champions and protectors. Through their interactions with visitors, hospitality staff can influence the take-up of activities via word-of-mouth, or 'low-level marketing', which is seen as very effective, especially in an environment conducive to new experiences. Trained staff can lead ad hoc activities, as some already do - *"we've trained a number of our team to be able to lead food foraging and talk about wildflowers, rockpool rambles..."*, thus providing convenient flexibility, which can be especially useful in high season or periods of changeable weather. Some attraction providers are more typically strong on staff knowledge about nature, given that education and engagement is a core part of their offer (see Box 2).

2. Eden Project

In operation since 2001, The Eden Project exists as an educational charity, and hosts the most popular attraction in the region, with over one million visitors to their Bodelva biome cluster in 2019 (ALVA, 2020). They have a trained site team who are able to tell the story of the climate emergency, the work happening at Eden, and how others can get involved. Education programmes range from school visits, to universities and business leadership courses. Eden is pushing forward with technology to enhance the visitor and educational experience, including a recent pilot to manage visitor flows. Having sustainability as a core belief raises expectations, and Eden is looking to improve low carbon transport options and increase renewable energy generation to stay ahead of the curve. With a strong brand, Eden has a key role to play in influencing supply-chain businesses, and collaborating with other parts of the visitor economy to stimulate nature's recovery.



Pre-booking

Whilst flexibility in offerings has advantages, the ability to manage guest flows in time and space has become an issue of utmost importance during the COVID-19 pandemic, and may have beneficial consequences beyond. Visitor attractions with previously unconstrained entry times were expected to impose pre-booking systems in summer 2021, with a view to making them a permanent arrangement. This may induce ripple effects to flatten the peak if visitors are not guaranteed entry to their favourite attractions. A more structured holiday experience may benefit all types of experience provider, with better visibility in terms of staffing and revenue.

Rural Offer

Rural locations, particularly farms, provide an alternative location to the coasts for nature-based activities, and could benefit from market development. Benefits to be had include diverting visitors from the coasts during peak season, providing alternatives during wet weather, engaging visitors with a different kind of nature, educating people about the food system, and providing diversification of revenue for a sector that is in a period of flux following Brexit. As described by one interviewee - *"Farmers are facing this cliff edge at the moment, because they have been receiving this basic payment scheme. And many haven't used that to adapt and change their business or run it in a business-like way. And that [funding] is going to end."* A successful operator benefitted from an upselling strategy, wherein low-cost farm activities provide a gateway to higher margin food and drink offers. They told us: *"I think in our case, we were very keen on showing where food came from, but basically, we were using it as a way of attracting people to come and have food. So we didn't charge very much for the activities, but they [would] then spend in the restaurant."* Concerns in relation to developing the rural offer focused on transport to and from resorts, and the proximity of other attractions. Conceivably, a cluster of attractions may be required to encourage day trips from coastal resorts. Both aspects are seen as an opportunity for tour guide offerings. Rural providers are also seen as having the potential to develop a low season offer, when there may be less competition from coastal activities, and accommodation providers are looking for attractions to recommend.

Visitor Demographics

Consideration of which types of activities appeal to which type of visitor, and how they should be marketed, provided insight into the challenges of managing both shifting and co-existent trends. With or without children is an obvious differentiating factor, and in one example, the offer had to change radically when a ban on term-time holidays was imposed: *"... issues around holiday and term time had a massive effect on the tourism industry that nobody's really looked into, but we lost 60% of our bookings overnight when that came in."* The MICE (Meetings, Incentives, Conferences and Exhibitions) market seems to excite or underwhelm in equal measure. Corporate business is seen as an opportunity to extract rents from deep pockets, but also as unreliable given budget dependence on business conditions, and it is perhaps inconsistent with Corporate Social Responsibility mandates, when considering Cornwall is a long way to travel for most of the target market. As one interviewee explained: *"Cornwall is not well suited to that, we are too far away for many people. And there was so much of what was said around some of those sort of peripheral markets in terms of expanding out the season etc., which I just fundamentally think is pie in the sky stuff; it's very small numbers, making very little impact."*



Visitor Behaviour

Concern about the impact of visitors on nature was highlighted by examples from summer 2020, when there was a notable increase in disrespectful and problematic behaviour. Speculation that this was associated with the COVID-19 pandemic, and a cohort of visitors who may more typically fly to sunnier locations, was not uncommon. Whether that was a one-off or to be repeated in summer 2021, particularly after repeated and prolonged lockdowns, was the cause of some anxiety. One person reported, for example: *"I think it's going to be a bit of a nightmare actually. It's going to be so busy with visitors, incredibly busy. Certainly from our point of view, our bookings are stupid, compared to a normal year. I think every bed space in Cornwall is going to be taken, and every campsite. It's going to be very difficult to manage I think."* More generally, the need to educate visitors about appropriate nature-friendly behaviour can take various forms, although the effectiveness of interventions is hard to measure without controlled conditions. The summer of 2021 was expected to require re-emphasised messaging in various mediums, and could be worthy of study. One suggested dual-purpose approach is the production of a combined nature engagement and behaviour guide, to be distributed widely in tourist accommodation and resorts, aimed at children and 'educating-up' to foster wider learning and communication about good behaviour with regards to nature.

Funding mechanisms

One key aim of the project was to assess how funds could be raised from the visitor economy to support nature. This is a recurring topic of conversation in the public realm, especially with regards to a possible tourism tax. Repeated reviews over years, if not decades, have failed to progress the debate beyond deeply felt (and often expressed) opinions. Despite the now widespread use of such a mechanism in Europe and beyond, typically in the form of an overnight stay or bed tax, or border entry taxes in some jurisdictions, there is no sign of any consensus emerging in Cornwall. Our interviews prompted the articulation of some powerful narratives against a tourism tax.

The view that visitors already incur a substantial tax burden, by contributing to business rates via accommodation tariffs, paying VAT on goods and services, and incurring car parking fees, plays to the notion of (un)fairness. An additional specific tax was therefore perceived to be unfair to the visitor, along with the potential to induce an anti-competitive stigma detrimental to visitor economy businesses. One interviewee suggested the likelihood of a 'Tax-Free Devon' tourism campaign being developed in response. The unfairness of a 'lazy bed tax', given that both the large informal accommodation sector and the high number of day visitors would avoid contribution, was another common complaint. The administrative burden of tax collection, the inevitable cannibalisation of visitor gifting, and the regressive nature of an assumed flat-rate tax, were also raised as reasons to avoid such an approach.

Our survey did not mention a tourism tax by design, but it was a prominent feature in the open comments section. The survey did include a ranking question on methods of supporting nature and, although the results can't be taken completely at face value due to a default frame and non-comprehensive choice set, there was clear support for visitors to fund any extra costs versus other methods such as local taxation, charities, and tourism businesses. This held for both visitor and resident subgroups (for further information see Appendix B).



Various alternative proposals for raising revenue were made by interviewees and survey respondents, with the retention of a proportion of VAT when it increases from the temporary 5% level appearing to be a particular favourite of interviewees. Presumably, this would need to apply to the tourism industry at a national rather than regional level, and would therefore require a persuasive national campaign. The use of car park fees to fund local projects was held up as a positive example, which local authorities would do well to explore. Wiser investment of both local and national taxes were also suggested as preferred options over raising new tax.

Voluntary payments in the form of visitor gifting were highlighted by accommodation providers, a number of whom were already including such options in their booking processes. The act of donating a relatively small monetary contribution to nature-based charities during the payment process may well be appealing to visitors, although anecdotal evidence suggests that an opt-out design is the main driver of success, and the opportunity for wider replication was seen as having great potential for charities with visitor economy business supporters (see Box 3).

3. Hotel Visitor Gifting

Successful visitor gifting schemes are in operation at a cluster of accommodation providers on Cornwall's north coast between Newquay and Padstow. Mother Ivey's Bay Holiday Park and Martha's Orchard, run by Patrick Langmaid, present an opt-out choice during the booking process to make a flat-rate contribution, with funds going to Cornwall Wildlife Trust. The amount raised is matched by the business, with those matched funds going to the local food bank. Approximately 70% of bookings result in a contribution to charity. This contrasts sharply with an opt-in choice used previously, which raised minimal amounts. The Scarlet & Bedruthan hotels, run by Emma Stratton, operate a similar scheme, also with a flat-rate opt-out. This presents a choice of fund beneficiaries, including Surfers Against Sewage, and has raised significant funds over recent years.

Carbon or biodiversity offsets were discussed by those who see the opportunity to develop projects in an interactive way with the visitor, even to the extent of tree planting as part of the donation experience. Caution was advised that this should be done in a sustainable manner, given the variables of appropriate species, location, season, and skill of the planter.

Legacies, grants, donations, and membership funds vary by contribution and predictability, but form key avenues of the fundraising effort by nature-focused organisations and can be transformative when large one-off sums are received (see Box 4).

4. National Trust

The National Trust is now 125 years old. It is a conservation charity with a remit covering both natural and built environments. Cornwall properties range from grand houses and gardens to abandoned tin mines and exposed cliff tops. The Trust balances conservation needs with accessibility, neatly summed up in the phrase 'for everyone, for ever'. To do so effectively requires significant funding, and the Trust has many avenues to achieve this. The majority comes from membership, which is seen as a value proposition for regular users of otherwise chargeable services e.g. access to houses, gardens, and car parks. Therefore, any increase in location prices or coverage is seen not only as direct revenue raising, but also driving increased membership. Other regular forms of income include residential and commercial rents, merchandise, and donations. Less regular but occasionally significant funds are legacies. These can fund multi-year programmes and, given wealth distribution trends, are seen as increasingly worth promoting.

Sources of funding for the rural sector have included the Countryside Stewardship Scheme, with one participant using funds to establish permissive footpaths and make tracks more accessible for disabled people. Following Brexit, and departure from the Common Agricultural Policy, a transition to the new Environmental Land Management Scheme (ELMS) is underway, with 'public money for public goods' heralding a fundamental shift from the previous basic payment scheme based on farmed land area.

The accountable spending of funds is important and can strongly influence the willingness and size of donation. Amongst our interviewees, one accommodation provider favoured contributions demonstrating tangible enhancements in their local area, whereas another placed trust in the receiving charity to use as it felt appropriate.

Organisational infrastructures

The effectiveness of existing networks, associations, and collaborative endeavours in general was discussed with interviewees. Common themes included the importance of localism, sharing of best practice, and the influence of larger bodies.

Representatives from regional networks shared the challenges and benefits of engaging local businesses and communities in developing their visitor economy offer. Creating a platform for voices to be heard, educating where necessary, then pursuing pragmatic policies with majority support, demonstrates a feasible approach to destination management. In some cases, the short-term success of a local or regional network can be dependent on the drive and capacity of an individual. The challenge then becomes how to avoid any over-reliance, and institutionalise the progress and legacy of the activity (see Box 5).

5. Tin Coast

The Tin Coast partnership is a local destination management network in West Penwith which began in 2016. The partnership consists of a mix of community and heritage organisations, and focuses on how tourism can both benefit a community and minimise the friction that can occur from over-tourism. When the mines closed in this area, the economy was negatively impacted and tourism became a significant industry, even though the infrastructure to support tourists was very weak. The partnership operates with a steering group that uses democratic principles to make decisions. The group has been able to come together to discuss and implement ideas to strengthen the local community and its economy. It provides a banner under which people can gather united by landscape, language, culture, and heritage. Operating within this localised model means the group can quickly find the tensions and hidden issues that a larger organisation may miss. The Tin Coast team received £500,000 from the Coastal Community Fund to run several different community events, from farmers' markets to theatre performances, to guided walks. Their website includes information on activities for visitors and how to travel sustainably. The work encourages the local community to design the relationship they want with their visitors. There is an app in development to expand the user experience and bring information live to people's phones whilst they are out and about. In addition, the group has organised training for local accommodation providers on the cultural history of the place. They have found a lot of merit in the local destination management set up, particularly when focusing on topics such as sustainability and ensuring community voices are heard.



Local and regional networks were also seen to be important for their role in promoting the interest of their communities at the county level, both in receiving a fair share of funding and in-kind support, e.g. promotional activities. Regional networks with spare capacity for visitors can push for coverage by highlighting the efficient distribution of visitors in peak season as a wider benefit. This collaborative approach was provided in contrast to reminiscences of vigorous regional rivalry during earlier years of tourism growth.

Sector networks play an important role with a more technical focus, although they may overlap with regional networks. The driving agenda of a sector network may inadvertently be both inspirational and divisive, and this has been exemplified by the CoaST (Cornwall Sustainable Tourism) network. With sustainability at its core, the majority of commenters expressed admiration, if not a little apprehension, at the pioneering approach taken towards embedding sustainable and regenerative practices in visitor economy businesses (see Box 6). This contrasts with the approach of Visit Cornwall, which was often seen as playing catch-up in these respects, as priorities have gradually evolved from economic growth above all else, to a more holistic understanding of the interdependence between economy, environment and society.

6. CoaST – Cornwall Sustainable Tourism Project

CoaST was set up by social entrepreneur Manda Brookman in 2004. It is a network of businesses and individuals committed to sustainable tourism. Currently it has 3,500 members attached to the network, with half of them in Cornwall. It contributes to the One Planet Tourism network. They work together as a self-supporting group to find ways that tourism can *“provide benefits to the community, economy and the environment, operating within our social, financial and environmental means”* (CoaST, 2021). CoaST is a live network that is based online, with plenty of information, tools, and a suggested visitor charter for Cornwall’s tourism businesses. Community outreach activities have not happened in the past year due to the COVID-19 pandemic and a lack of funding. Previously, in 2015, the network received funding from the European Regional Development fund to carry out a programme called ‘ReBoot: capacity building for environmental growth’. The objective was to *“enable the tourism industry to become an active proponent of environmental growth: to take on a front-line position in encouraging their peers in the visitor economy, and their 4.5 million visitors a year, to think about not just slowing down the damage being caused to our natural systems, but to start actually building them”* (Brookman, 2015: 2). This programme is directly in line with the current objectives of our research; it engaged businesses, educated members, provided practical tools and led to *“actual improvements on the ground, improved confidence, and a simple means of measuring progress”* (Brookman, 2015: 6). The impact and legacy of Manda’s and CoaST’s work is clear from the interviews conducted as part of this research, and many people cited its importance in shaping their thinking and supporting innovation.



For those businesses that have integrated sustainability into their operations, examples were given both of leveraging it into a major part of their brand (e.g. “luxury eco-hotel”) and being confident of best practice without explicit promotion. It was suggested by another accommodation provider that visitors do not care about green issues, at least compared to factors such as cost, but ways could be found to encourage more sustainable behaviour, such as through recommending local farm shops and self-powered activities.

The influence of the public sector in driving change was thought to be lacking in respect of sustainable practices. Perceived over-patronage of big business, to the neglect of smaller, local firms, gives little incentive for change. Partial devolution of funding decisions via the crowdfunder initiative - in which crowd-supported projects are match-funded by the council - may signal a move in the right direction, but if broader spending policies are not aligned this could also be labelled as ‘greenwash’, particularly given the size of funds involved.

7. Watergate Bay Environmental Tourism Trust (WETT)

Started in 2000 by Will Ashworth of Watergate Bay Hotel, the WETT was a coalition of local businesses which approached the local council and were given permission to run the local grass car park. With the revenue, they were able to pay for lifeguarding, beach cleaning, and a ranger to give free nature guiding, which proved particularly popular for families with children. This ran successfully for several years, until the council withdrew permission to run the car park. An effort was made to replace the lost revenue with business contributions, but this proved difficult, and the coalition fell away, with services becoming reliant on individual donations.

Strong arguments were made concerning the necessity to include views from the farming and private landowning sector, given the extent of their land coverage in Cornwall, when discussing any nature-based economic and/or environmental policies. Their experience in managing land and running productive businesses was felt to contrast with the overly dominant public sector voice when reviewing strategy and influencing policy.

Social enterprises, characterised by a triple-bottom line ‘profit with purpose’ approach to business, were presented as being well-positioned to deliver both to the visitor economy and back to nature and/or society, as embedded in their legal structure. This contrasts with limited companies that might choose to give back or not, at the whim of directors. Knowledge about the merits of social enterprises was thought to be variable and misjudged in some cases, requiring engagement and opportunity to showcase best practice.

Collaborations were thought by many to be at the core of change making, and vital to enabling nature recovery. The potential to coalesce around and contribute to mutually beneficial projects, with the inclusion of visitors, locals, businesses, landowners, and third sector organisations, is seen as key. Such endeavours exist everywhere, so the concept is not new, but effective collaboration may require a structured approach that can be easily disseminated. They also require aligned support from the public sector, to ensure complementarity of goals and approaches. A strong example came from Watergate Bay (see Box 7).



The Cornwall 'brand' can be perceived as a type of organisational asset. In relation to tourism it was said to be strongly associated with nature and wildlife, second only to Scotland in the UK. This may surprise some of those who operate within Cornwall who feel the brand does not match the reality. To what extent this matters to visitors may be illusory, however, and an example was given relating to Cornwall's attraction as a surfing destination despite the fact that the number of surfers remains a small proportion of overall visitors. Similarly, nature-based marketing may appeal to visitors, but care should be taken not to overestimate demand for activities engaging with nature.

Transport infrastructure was a key focus for some interviewees, particularly those with sustainability mandates. Better coverage for EV charging, cycle trails and hiring of bikes/e-bikes, more reliable, useful, and integrated public transport services, improved multi-modal links between sites under the same organisational umbrella, an enhanced journey experience (with relevant media on-board), and opportunities to stop off in biodiversity hotspots, were all mentioned. Again, these issues would require broad collaborations and efforts to address challenges surrounding ownership/management of land, transport networks, and communication to boost demand.

Digital infrastructure is an emerging focus with strong potential to transform the visitor experience at both macro and micro levels. Providing app-based access to relevant and timely information and offers reveals the prospect of a 'win-win-win' approach, in which the visitor enjoys a richer experience, local businesses gain more custom, and the destination manager can relieve pressure on hot-spots. Clearly this will not suit all visitors, though the impacts could still be significant with only partial adoption. Following an initial trial at Eden, this technology is due to be rolled out on a regional basis at Tin Coast in 2021. The National Trust and Tin Coast are also scheduled to bring augmented and virtual reality technology to the visitor economy, enhancing the visitor experience, and the appeal of under-visited areas of the county (e.g. East Pool mine).



Recommendations and Next Steps

Local networks

The visitor economy brings large amounts of revenue to Cornwall, benefiting businesses, employees, local supply chains, and local authorities. The majority of residents, however, do not receive such benefits, and see peak-season tourism as an inconvenience, breeding resentment in some cases. For the visitor economy to be sustainable, the revenue benefits need to be shared more widely and tangibly. Local networks with community buy-in can provide the platform to develop these wider benefits, assuming they have access to revenue. This can come from devolved authority, such as control over local car parking revenues, visitor economy businesses, or voluntary contributions. The key to success is having a well-organised structure to raise and handle revenues, develop attractive projects, include community views, and engage with visitors. Such a framework should be designed from best practice and local examples, whilst being flexible enough for adoption at different scales, and by existing local networks, which proliferate in various forms around Cornwall.

Nature recovery projects

For local networks to succeed in dispersing benefits from the visitor economy, attractive projects need to be developed. Nature recovery is widely supported and will enhance collective wellbeing whilst addressing the urgent need to avoid biodiversity collapse. Viable, visible projects are easier to communicate, and to promote for fund-raising, than generalised funds developing remote projects. Crowdfunding mechanisms can be used to efficiently raise and channel funds, although project development should also consider opportunities for direct, hands-on involvement to maximise local inclusion and broaden the visitor offer. Identification of project opportunities can be supported through using multi-layered mapping tools such as Lagas (<https://lagas.co.uk/>), which could also demonstrate progress over time on a range of natural, environmental or social metrics.

Visitor gifting

Based on best practice examples, visitor gifting can contribute significant funds to charities or projects. Those examples with opt-outs as part of the accommodation booking process may be largely driven by the power of default and relative size of contribution (versus the accommodation fee). However, as an alternative to a tourism tax, this should be less divisive. Wider roll-out and design experimentation, including the use of funds for local nature recovery projects, should be a low-cost, 'least regrets' option of revenue raising. There is also an under-developed opportunity to include visitor gifting as part of the activity/attraction booking process. As pre-booking becomes more widespread, such a mechanism can become standard, whilst retaining a voluntary approach.



Recommendations and Next Steps

Nature education for hospitality staff

Hospitality staff are often on the frontline of the visitor economy. Through informal conversations they have significant power to enhance the visitor experience. Staff trained in best practice around nature engagement, with awareness of local nature-based activities, could be a more significant influence than any paid marketing campaign on improving the relationship between the visitor economy and nature. Such training would also encourage identity with and championing of nature, which is vital if nature recovery is to gain traction. The training could be delivered by nature-focused organisations, providing a revenue generation opportunity. Whether in person or remotely, training materials could be developed alongside visitor-facing material, to reinforce the messaging and encourage self-guided nature-friendly activities.

Rural visitor economy development

There are many motivating factors to develop the rural visitor economy in Cornwall. Spreading the load of peak-season visitors, providing alternatives on wet-weather days, year-round potential, and much needed income diversification are just a few possible benefits. Challenges exist around transport, funds for development, and competing demand on time from primary business. Relationships with coastal resort networks and co-management of visitor offers should be encouraged. Best practice examples should be established and disseminated, leading to a more symbiotic rural-coastal relationship with regard to the visitor economy.

Technology-assisted visitor economy

Around the world, the visitor economy is on the cusp of transformation via tech-assisted infrastructure. The next generation of technology, by permissibly utilising visitor data, has the potential to provide multiple benefits by enhancing the visitor offer, reducing the negative impacts on vulnerable environments, and increasing the scope for local businesses to attract custom. Lessons learned from imminent roll-outs should be documented and disseminated to understand efficacy, and the potential for improved capacity management over time.



References

- Association of Leading Visitor Attractions (ALVA) (2020) Visits made in 2019 to visitor attractions in membership with ALVA. Available at <https://www.alva.org.uk/details.cfm?p=610> (accessed 21 April 2021).
- Bell, M., Steel, A., Houston, D. (2020) Delivering for Cornwall and Isles of Scilly; Our Visitor Economy at the Crossroads 2030 and Beyond. Paper available from Visit Cornwall.
- Brookman, M. (2015) ReBoot: Capacity building for environmental growth, end of contract report.
- CoaST (2021) Who we are, <https://www.coastproject.co.uk/about> (accessed 9 April 2021).
- Cornwall and Isles of Scilly Local Enterprise Partnership (2020) Draft Local Industrial Strategy, <https://www.cioslep.com/assets/file/Final%20CloS%20DRAFT%20Industrial%20Strategy%20-%202009.03.20.pdf> (accessed 9 April 2021).
- Cornwall Council (2019) Climate Change Plan: creating the conditions for change through direct action and a new form of place-based leadership for Cornwall to become net carbon neutral, Cornwall Council, Cornwall. Available at: <https://www.cornwall.gov.uk/media/40176082/climate-change-actionplan.pdf> (accessed April 2021).
- Cornwall Council (2021) Draft Environmental Growth Strategy: 2020-2065. Available at: <https://www.cornwall.gov.uk/media/45400669/environmental-growth-strategy-refresh-draft-for-consultation.pdf> (accessed April 2021).
- Cornwall Guide (2011) <http://www.cornwalls.co.uk/history/industrial/> (accessed April 2021).
- Cornwall Wildlife Trust, Cornwall Council (2020) State of Nature Cornwall 2020.
- Davies, E. (1969) Tourism and the Cornish Farmer, PhD thesis, University of Exeter Department of Economics (Agricultural Economics).
- Wood, M., Milstein, M., Ahamed-Broadhurst, K. (2019) Destinations at Risk: The Invisible Burden of Tourism, The Travel Foundation.



Appendices

Appendix A: Workshop participants and interviewees

| Name | Position, Organisation |
|-------------------------|--|
| Will Ashworth | Chief Executive, Watergate Bay Hotel |
| Robin Barker | Director, Services 4 Tourism |
| Patrick Aubrey-Fletcher | County Adviser, National Farmers Union |
| Sally Heard | Director, School for Social Entrepreneurs |
| Patrick Langmaid | Owner, Mother Ivey's Bay Holiday Park |
| Melodie Manners | Business Development Officer, Cornwall AONB |
| Ian Marsh | General Manager West Penwith, National Trust |
| Clare Parnell | Farmer & Board Member, Cornwall Local Enterprise Partnership |
| Charles Sainsbury | Energy and Sustainability Manager, Eden Project |
| Matt Slater | Marine Awareness Officer, Cornwall Wildlife Trust |
| Colin Speedie | Founder, The WiSe Scheme |
| Kim Spencer | Vice Chair, SECTA |
| Emma Stratton | Co-owner/Director, Scarlet Hotel |
| Andrew Williams | Owner, Lanhydrock Farms |
| Ruth Williams | Marine Conservation Manager, Cornwall Wildlife Trust |

Appendix B: Surveys Resident/Visitor Survey

Workshop and interview feedback regarding nature-based activities included some scepticism about the extent of visitor demand, and the consequent potential to encourage engagement and generate revenue to support nature protection and restoration. A survey was designed to assess current engagement with nature, and preferences around different forms of support for nature. Given limited time and reach beyond Cornwall, most respondents were residents (n=393, 83%), with visitors providing a comparative subgroup (n=81, 17%). This changed the intended emphasis of the survey, but was useful nonetheless as a measure of baseline and relative demand for such activities. Initial Likert scale questions were asked about the current state of, and concern for, nature in both Cornwall and the UK as a whole. Responses implied that the state of nature is perceived negatively (i.e. in a bad state) in both the UK and Cornwall, but less so in the latter case, and neutrally by the visitor subgroup. Concern for nature is strong, and reflected the difference in perceived state, by being stronger for the UK as a whole (see Table B1).

Table B1 - Attitudes towards and concern for state of nature in UK and Cornwall

| Topic | Measure | Resident+ | Visitor+ | Total | Notes: 5 option Likert (Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree) State of Nature and Concern questions framed in opposing directions (UK = Good State, Cornwall = Bad State) The Likert options are coded as values (-2, -1, 0, 1, 2). A negative score indicates a perceived negative state of nature or a positive concern for nature. Average values for each question are shown. |
|--------------------------|---------|-----------|----------|-------|---|
| State of Nature UK | Count | 388 | 79 | 467 | |
| | Average | -0.77 | -0.44 | -0.71 | |
| Concern UK | Count | 381 | 77 | 458 | |
| | Average | -1.21 | -1.06 | -1.19 | |
| State of Nature Cornwall | Count | 377 | 74 | 451 | |
| | Average | -0.42 | 0.04 | -0.35 | |
| Concern Cornwall | Count | 377 | 72 | 449 | |
| | Average | -0.86 | -0.71 | -0.84 | |

(Resident+, Visitor+ shown throughout as some respondents were re-coded).

Participation in nature-based activities were found to be mainly in the form of self-guided activities (>90% overall, >80% for visitors), with free club or group activities undertaken by a significant minority (~30% for both residents and visitors). Paid trips and tours were undertaken by 15% of respondents, although for the visitor subgroup this was closer to 25%. 'Other' responses were coded providing two new groups: job and volunteer. The figures in these cases are minimums for the sample, as they weren't explicit choices (see Table B2). Respondents averaged 1.5 selections in both subgroups.

Table B2 - Nature-based activity participation by type

| Activities | Resident+ | | Visitor+ | | Total | |
|-------------|-----------|-------|----------|-------|-------|-------|
| Self-Guided | 366 | 93.1% | 67 | 82.7% | 433 | 91.4% |
| Club, Group | 115 | 29.3% | 23 | 28.4% | 138 | 29.1% |
| Paid Tour | 52 | 13.2% | 19 | 23.5% | 71 | 15.0% |
| Job | 18 | 4.6% | 0 | 0.0% | 18 | 3.8% |
| Volunteer | 23 | 5.9% | 1 | 1.2% | 24 | 5.1% |
| None | 15 | 3.8% | 10 | 12.3% | 25 | 5.3% |

The next section of the survey was primed/framed with information about the recent State of Nature report in Cornwall, under the title "Nature in Cornwall is in steep decline" including positive reference to the impacts of conservation efforts. Three questions followed concerning provision of support for nature.

When asked about interest in supporting the recovery, protection and regeneration of nature in Cornwall, 70% of responses were affirmative, and just 3% negative, with the remainder uncertain. Visitors were more equivocal as a subgroup with 58% "Yes", and 37% "Maybe" (see Table B3).

Table B3 - Interest in supporting nature in Cornwall

| Support? | Resident+ | | Visitor+ | | Total | |
|----------|-----------|-------|----------|-------|-------|-------|
| Yes | 283 | 72.4% | 47 | 58.0% | 330 | 69.9% |
| Maybe | 99 | 25.3% | 30 | 37.0% | 129 | 27.3% |
| No | 9 | 2.3% | 4 | 4.9% | 13 | 2.8% |

Given a range of choices of how to support nature, ~80% chose "Take part in an activity that directly helps nature" (68% for visitors). Whether popular because a 'free' option, or because of a desire to engage directly with nature, it did not preclude significant minority support for paid options; donate to conservation fund 36%, donate to regeneration fund 39%, pay additional fee for nature-based activity 42% (62% for visitors) (see Table B4). The significance of the latter result should be tempered by previous answers about current / previous participation in paid activities. Whether state of nature framing provides a realistic incentive to encourage such participation is open to exploration. Respondents averaged 2 selections in both subgroups.

Table B4 - Methods of supporting nature

| Action | Resident+ | | Visitor+ | | Total | |
|-------------------|-----------|-------|----------|-------|-------|-------|
| Add Activity Fee | 148 | 37.7% | 50 | 61.7% | 198 | 41.8% |
| Direct Activity | 327 | 83.2% | 55 | 67.9% | 382 | 80.6% |
| Conservation Fund | 153 | 38.9% | 31 | 38.3% | 184 | 38.8% |
| Regeneration Fund | 141 | 35.9% | 29 | 35.8% | 170 | 35.9% |
| Job | 11 | 2.8% | 0 | 0.0% | 11 | 2.3% |
| None | 4 | 1.0% | 2 | 2.5% | 6 | 1.3% |

The final question asked respondents to rank 5 methods/sources of raising money to support nature, namely; National taxation, Local taxation, Cornish nature charity membership, Visitors to Cornwall, Tourist businesses in Cornwall. This was the default ordering, with no randomisation functionality available, thus compromising face-value interpretation of results. However, there was a clear separation between the top two choices (National taxation and Visitors to Cornwall) versus the remaining three. This was the case for both resident and visitor subgroups. Relative to default rank, Local taxation was moved from 2nd preference to 4th/5th, whereas Visitors to Cornwall was moved from 4th to 1st/2nd (see Table B5).

Table B5 - Ranking of funding mechanisms

| Fund source | Default | Resident+ | Visitor+ | Total | Notes: Resident/Visitor/Total values are averages based on rank position (+2 for 1st, to -2 for 5th) |
|--------------|---------|-----------|----------|-------|---|
| National Tax | 2.00 | 0.44 | 0.39 | 0.43 | |
| Local Tax | 1.00 | -0.35 | -0.41 | -0.36 | |
| Charities | 0.00 | -0.47 | -0.14 | -0.42 | |
| Visitors | -1.00 | 0.61 | 0.31 | 0.56 | |
| Businesses | -2.00 | -0.22 | -0.15 | -0.21 | |

At the end of the survey a space was provided for any further comments about nature or nature-based activities in Cornwall. As many as 145 respondents (30%) provided such a comment, covering a wide range of topics. These were re-coded into themes using Nvivo (see Table B6).

Table B6 - Open comment categories

| Theme raised by respondents | n=145 |
|---|-------|
| Land management (new housing, second homes, farming etc.) | 29% |
| Nature-based activity ideas | 21% |
| Tourism policy / Restriction of over-tourism | 20% |
| Education and behaviour | 17% |
| Taxation to pay for nature | 15% |
| Faults with our approach and the survey | 9% |
| Infrastructure | 6% |

As might be expected, the survey revealed some strongly contrasting views about the pros and cons of both nature-based activities and the impact of tourism, as illustrated by the following comments: *"Nature will not survive the onslaught of tourism. Tourism needs to be reduced and better managed to reduce the impact of erosion, litter, pollution and congestion on the flora, fauna and people of Cornwall."*

"I really do not like the idea of penalising tourism businesses and their guests as they contribute a huge amount to the local economy every year and have their own expenses, which seems to be overlooked and marginalised."

Although the survey focused on tourism, the largest number of comments concerned the theme of land management, specifically how houses, land and farming are managed locally. Several people questioned the role of second homes and people were extremely concerned by housing development activity.

Business Surveys

A brief survey to gauge the type of nature-based activities being conducted was disseminated via a Tevi newsletter. This received 11 responses, all of whom indicated a willingness to help with follow-up research.

A 15-question, interview-style survey was then sent to this group, receiving 7 responses. Some were primarily accommodation providers, others specific activity businesses, ranging from 2 months to 18 years of existence.

A notable split response emerged between those offering activities for ~6 months due to perceived viability, and those who would try to offer activities all year round if demand permitted.

Mitigation of nature disturbance via restricted access and education was complemented by engagement and skills development to enhance nature across different types of activities.

Little appetite was expressed for standards or certification schemes, due to perceived additional bureaucracy and costs. Training where appropriate is already undertaken and enhances the business.

Co-benefits of promotion alongside paid for certification was not a welcome idea, perhaps because the example of Visit Cornwall as lead promoter provoked negative opinions. Contribution of fees to nature charities was more favoured and this correlated with respondents being members of such organisations.

Local networks and collaborative endeavours do exist, with varying degrees of structure. Good intentions may be compromised by limited knowledge in some cases, leading to ineffective action.

Views that local projects and networks should be developed to aid nature recovery perhaps reflect the scale of respondent businesses. Frustration about larger corporate influence, and their negative environmental impacts was consistent in this respect.

Appendix C: The global tourism industry and sustainability

In 2016, tourism accounted for 10% of the global economy and was projected to grow 4% a year until 2030 (UNWTO, 2018). This growth has consequences for local communities and ecosystems, particularly where demand has been greatest (Wood et al., 2019). Over time, industry managers have tended to divide between those focused on expansion (Hall, 2008) and those who recognise the need for boundaries, aiming to manage tourism so that it is more responsible and sustainable (see Bramwell et al., 2008). There is new evidence to suggest that even as tourist numbers increase, margins are falling and the industry is no longer supporting its local population as it did in the past (Wood et al., 2019). The demand for more sustainable models of tourism is thus likely to grow.

Given the impact of the COVID-19 pandemic on the tourism sector, there is a risk that some industry specialists and policy makers will be calling for unparalleled efforts at revival and growth. The United Nations World Tourism Organization has estimated there was an 80% decline in international tourism in 2020, associated with US\$1.2 trillion loss in revenues with a risk to 120 million tourism jobs (UNWTO, 2020). Given the importance of the tourism industry, and the severe impact of the global pandemic, there is a danger that the environmental burdens are ignored in the push to recover.

As the tourism industry has grown over the past 50 years, the environmental pressures have become increasingly apparent. Budowski's paper in 1976 was one of the first in the field to discuss how tourism relates to nature and the dangerous implications of a 'laissez-faire' approach. He highlighted the importance of the industry working with conservationists and the local community to ensure tourism could at least be better planned and managed. Since that paper was published, a much larger body of literature has developed in the field of sustainable tourism, and more recently regenerative tourism, in which scholars differentiate between extractive, sustainable and regenerative models of tourism (see Table C1).

Table C1: Models of tourism and their implications for nature

| TOURISM MODEL | CHARACTERISTICS | RELATIONSHIP TO NATURE |
|---------------|--|------------------------|
| Extractive | The sale and consumption of local natural resources and culture. | Conflict |
| Sustainable | Efforts to manage the burdens of tourism with as little impact on nature and local culture as possible whilst generating employment. | Co-existence |
| Regenerative | Non-extractive tourism that exists in balance with the local community and provides resources to conserve and regenerate nature. | Symbiosis |

Source: Sofronov (2017); Sheller (2020); Budowski (1976).

Although tourism is often framed as a non-extractive service industry, Sheller (2020) exposes the ‘extractive’ forms of tourism that depend on the commodification of places, without regard for the negative impact this has on local communities and natural environments. These forms of tourism are often underpinned by a market-oriented view that tourism is ‘just another business’ with little recognition of its associated costs, impacts, and potential conflict with nature, local infrastructure, communities, and culture (also known as the ‘externalities’ of the sector) (Marcouiller, 2007).

In 1980s Britain, heritage and associated tourist and leisure activities were often seen as an economic cure for economically deprived regions, such as Cornwall. There was a common argument that “*anything that brings money into an area is an improvement*” (Bulstrode, 1988, cited in Deacon et al., 1988: 1). While tourists have brought money and stimulated employment in many places, there is now much wider recognition of the need to reconsider the extractive qualities of tourism and take a more sustainable view in relation to the environment, as well as employment quality and the distribution of wealth (Zwegers, 2018).

Sustainable tourism is defined as tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities (UNWTO, 2019). This requires specific policies and strategies to make it happen (Boluk et al., 2019; Hall, 2019; Scheyvens and Hughes, 2019), with associated monitoring to understand local impacts and the capacity to deploy preventive and/or corrective measures whenever necessary (Sgroi, 2020). Even then, there is a significant challenge in ensuring that the promise of protecting assets for future generations can be delivered (Wood et al., 2019). As Noel Josephides, Chair of the Travel Foundation (cited in Wood et al., 2019: 5) recently put it: “*A few destinations are, commendably, seeking to take a different approach. Some are introducing tourism taxes, some are placing restrictions on certain types of tourism (such as AirBnB and cruises), some are adapting their marketing strategies and are becoming more concerned about residents’ views. But these responses are generally reacting to a specific issue that has reached a flash point and can no longer be ignored. What other issues may be simmering under the surface waiting to appear in years to come? My sense is that we are not getting to the root of the problem. And that not much, and not enough, is changing in the way we manage tourism.*”

In this regard, recent efforts have focused on a more ambitious approach to reconciling tourism with the pressures it causes. There has been increased advocacy for regenerative tourism where *“visitors and destinations are part of a living system embedded into the natural environment, and it [tourism] operates under nature’s rules and principles”* (Hussain, 2021: 2). This approach recognises the interconnected nature of tourism and is designed to give back to people, place and nature. Some forms of regenerative tourism have also moved away from a focus on raising money to include enterprise, exchange, labour, transactions, property and other assets that can be mobilised to regenerate the local environment and its communities (Cave, 2020). You could imagine a tourist industry that works directly with local farmers to support their work, builds renewable energy micro-grids, and locally stimulates regenerative circular economies that also reduce waste (Sheller, 2020). Such practices would benefit the broader community, well beyond those directly involved in the visitor economy, widening support for an industry that has often been seen in a negative light.

With the COVID-19 pandemic heavily impacting the international tourism market for the island of Aotearoa New Zealand, the industry has had a chance to look inwards, engage more deeply with indigenous wisdom on the island and discuss developing a domestic market that is rooted in regenerative travel. In 2018, 40% of New Zealanders surveyed were worried about the effects of the growing number of tourists upon infrastructure, way of life and the environment (Cropp, 2017, 2018). There has been a campaign of public engagement around the challenges facing the sector, reflecting growing concern about the contradictions imposed when creating a better natural environment, only to continue exploiting it. Instead, they are advocating a necessary reassessment of what kind of tourism they would like to see in order to stem any further degeneration, allowing regeneration to occur (Matunga et al., 2020). In Maori culture, regenerative tourism cannot be separated from the health of people and place. It is therefore to be ‘additive’ as opposed to ‘extractive’. This way of thinking is seeping into mainstream literature, discussion, and policy development. Tourism New Zealand is putting the need to give back more than we consume at the *“heart of every single thing we do”* (Tourism New Zealand CEO Stephen England-Hall, 2020).

VisitScotland provides an example of these developments closer to home. They were the first national tourist organisation to declare a climate emergency in 2020 and the organisation is providing advice for tourism businesses about how they can reduce emissions and become more responsible. They are aiming to protect communities and local environments and have been in the process of forming partnerships with environmental experts and bodies to raise the bar across the whole industry (VisitScotland, 2020).

As the global tourism industry recovers from the COVID-19 pandemic, any additional growth is likely to add to the burdens faced in places that are already suffering the combined pressures of ecosystem degradation and climate change. As such, it is a critical moment to consider the future direction of the industry, and ways to ensure that recovery works in symbiosis with local ecosystems and communities, sustaining them for the long term. The draft industrial strategy for Cornwall and the Isles of Scilly pledges to ensure that the visitor economy becomes a *“global leader for low carbon experiences for visitors and residents, maximising links to the environment, heritage and culture”* (Cornwall and Isles of Scilly Local Enterprise Partnership (CIOSLEP), 2020: 59). Visit Cornwall has been developing its post-pandemic strategy and is exploring how to put the regeneration of nature and tourism at the centre of its objectives. A new way of thinking will be needed to prioritise the regeneration of the environment and local communities, working within the boundaries of the natural environment.



Sustaining the Environment and Visitor Economy in Cornwall

- Boluk, K.A., Cavaliere, C.T., Duffy, L.N. (2019) A pedagogical framework for the development of the critical tourism citizen. *Journal of Sustainable Tourism*, 27: 865–881.
- Budowski, G. (1976) Tourism and Environmental Conservation: Conflict, Coexistence or Symbiosis? *Environmental conservation*, 3: 27-31.
- Cave, J., Dredge, D. (2020) Regenerative tourism needs diverse economic practices, *Tourism Geographies*, 22: 503-513.
- Cornwall and Isles of Scilly Local Enterprise Partnership (2020) Draft Local Industrial Strategy, <https://www.cioslep.com/assets/file/Final%20CloS%20DRAFT%20Industrial%20Strategy%20-%2009.03.20.pdf> (accessed 9 April 2021).
- Cropp, A. (2017) Our love hate relationship with tourists - New Zealand's visitor fatigue. Available at: <https://www.stuff.co.nz/business/92924319/our-love-hate-relationship-with-tourists--newzealands-visitor-fatigue> (accessed May 2021).
- Cropp, A. (2018) Almost half of Kiwis surveyed worried about impact of tourism growth. Available at: <https://www.stuff.co.nz/business/100678034/sharp-rise-in-angst-about-tourism--almost-half-kiwis-surveyed-worried-about-impact-of-visitor-growth> (accessed May 2021).
- Deacon, B. (1988) Cornish Culture or the Culture of the Cornish?, *Cornish Scene*, NS1: 58-60.
- Hall, C.M. (2019) Constructing sustainable tourism development: The 2030 agenda and the managerial ecology of sustainable tourism, *Journal of Sustainable Tourism*, 27: 1044–1060.
- Havas PR (2019) Palau Pledge Portfolio <https://havaspr.com/portfolio/palau-pledge/> (accessed 25 March 2021).
- Hussain, A. (2021) A future of tourism industry: conscious travel, destination recovery and regenerative tourism, *Journal of Sustainability and Resilience*, 1: 1-10.
- Marcouiller, D.W. (2007) Rural tourism promotion as public policy: Panacea or Pandora's Box? *Journal of Regional Analysis and Policy*, 37(1): 28-31.
- Matunga, H., Matunga, H., Ulrich, S. (2020) From exploitative to regenerative tourism: Tino rangatiratanga and tourism in Aotearoa New Zealand, *A New Zealand Journal of Indigenous Scholarship*, 9(3): 295-308.
- Scheyvens, R., Hughes, E. (2019) Can tourism help to "end poverty in all its forms everywhere"? The challenge of tourism addressing SDG1, *Journal of Sustainable Tourism*, 27: 1061–1079.
- Sheller, M. (2020) Reconstructing tourism in the Caribbean: connecting pandemic recovery, climate resilience and sustainable tourism through mobility justice, *Journal of Sustainable Tourism*, 1-14.
- Sgroi, F. (2020) Forest resources and sustainable tourism, a combination for the resilience of the landscape and development of mountain areas, *Science of the Total Environment*, 736: 139539.
- Sofronov, B. (2017) Impact of sustainable tourism in the travel industry, *Annals of Spiru Haret University. Economic Series*, 17: 85-94.
- Tiaki Promise - Care for New Zealand (2018) <https://www.newzealand.com/int/feature/tiaki-care-for-new-zealand/> (accessed 3 March 2021).
- VisitScotland (2020) www.visitscotland.com (accessed 28 April 2021).
- UNWTO (2020) Tourism and the Sustainable Development Goals – Journey to 2030, World Tourism Organization (UNWTO).
- Wood, M., Milstein, M., Ahamed-Broadhurst, K. (2019) Destinations at Risk: The Invisible Burden of Tourism, The Travel Foundation.
- Zwegers, B. (2018) Goldmine or Bottomless Pitt? Exploiting Cornwall's Mining Heritage, *Journal of Tourism, Heritage & Services Marketing*, 4: 15-22.



